

# Performance Management Format Rollout/Implementation Steps to Follow

## Step 1 Get the Big Picture

- Review and become familiar with the resources on the Performance Management web page at <http://www.dhr.idaho.gov/HRInfo/PerformanceManagement.aspx>.
- Meet with agency director and/or upper management to explain the format changes.
- Get management's support and develop an implementation plan as soon as possible.

## Step 2 Define Your Agency's System

- Decide whether your agency will use the suggested rating titles for the four levels: Exemplary, Solid Sustained, Achieves Performance, Does Not Achieve Performance.
- Inform the Division of Human Resources of any desired rating title changes for the levels. The rating descriptions cannot be changed.
- Decide whether your agency will rate the individual Performance Standards (e.g., customer service, decision making) in addition to the employee's overall performance level. This will determine which evaluation template your agency uses.

## Step 3 Tailor Your Agency's Template

- Request the new evaluation template from the Division of Human Resources. To request this, send an email to Karece at [kbull@dhr.idaho.gov](mailto:kbull@dhr.idaho.gov) or phone 208-429-5511. Note whether you want the basic template or the template that provides space for rating each performance standard.
- Customize the evaluation template to your agency when you receive it. Add your agency's name. If you received approval for changes to the four rating titles, make those changes. If you wish to move the rating level descriptions forward in the document, do so.
- Save the evaluation template to either Employee Appraiser or to a computer drive in your agency where supervisors can easily access it.

## Step 4 Communicate Changes to Your Agency

- Communicate with your agency supervisors/managers via email, describing the upcoming format changes, dates, levels, and descriptions providing the Performance Management web page as a reference <http://www.dhr.idaho.gov/HRInfo/PerformanceManagement.aspx>, and require them to (choose your agency method):
  - Attend a meeting where you describe the changes and go through the Performance Management web page and agency timeline as a group. Track attendance.

- Go through the online Performance Management page. In your [email](#), provide your agency's timeline for the change, describe any changes to rating titles, and provide the new evaluation template. Ask them to notify you when they have gone through the online information on the Performance Management page. Track completion.
- Communicate with your agency staff, describing the upcoming format changes, timeline, levels, descriptions, and template, providing the Performance Management web page as a reference <http://www.dhr.idaho.gov/HRInfo/PerformanceManagement.aspx>.
- Post the Performance Management format change information on your Intranet and address it as a general information item at your staff meetings.
- Email your supervisors/managers one week prior to your agency's roll out date, reminding them that the new evaluation form, levels, descriptions, and performance factors will be changing effective \_\_\_\_\_ and that all performance evaluations delivered on that date should follow the new format.
- Decide and communicate to your supervisors/managers whether they may begin using the new levels prior to your agency's roll out date.
- Post on the Intranet, or by email, where supervisors/managers and employees should go if they have questions.

### Sample Email

Customize this email to your Supervisors/Managers:

In January 2006, changes were made in Idaho's Performance Management format/system in order to bring consistency to the evaluation process. As a supervisor or manager, you are responsible to be familiar with these changes. Changes to the new system will occur in our agency on \_\_\_\_\_. Any evaluation created on or after \_\_\_\_\_ must comply with the new format changes. Those changes include:

- Moving from a Two-Level Rating System to a Four-Level Rating System.
- Addition of Rating Level Definitions to the evaluation document.
- Addition of a new Performance Standard to the evaluation template for both employees and for supervisors/managers.
- Enhanced definitions and examples of the Performance Standards.
- New evaluation templates.

For more information on these changes, go to <http://www.dhr.idaho.gov/HRInfo/PerformanceManagement.aspx> and view the full text.

Our agency will be using the rating level titles as described on the web page above: Exemplary, Solid Sustained, Achieves Performance, Does Not Achieve Performance. (or insert here the rating level titles your agency had approved). To provide consistency, our agency will be using pre-defined statewide rating level definitions. In addition, the Performance Standards have been updated; please read the Performance Standard definitions carefully as they have been re-written. The 'For Example' section beneath each standard can be customized to the positions you supervise. Please feel free to tailor these to meet your needs.

These changes will be discussed further at (an upcoming meeting, a training session you may be presenting, in upcoming emails...). Information is also posted on our agency Intranet at [http://\\_\\_\\_\\_\\_](http://_____). If you have additional questions or concerns, please contact me.

Agency staff will be initially notified of these changes via an email from our agency HR office in \_\_\_\_\_ days or weeks.

Agency HR Manager